CheckMark 1095

User's Manual

1095

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Chapter 1 Installation and Startup

Contacting CheckMark

CheckMark provides support and assistance with the 1095 software. If you have questions and need to contact CheckMark, the options are below.

Online at: http://www.checkmark.com/company/contact.php

CheckMark Technical Support: 970-225-0387.

CheckMark Sales: 800-444-9922.

CheckMark Inc.
724 Whalers Way, Bldg H Ste 101
Fort Collins, CO 80525

Installing CheckMark 1095

Macintosh Install

1. Close all programs and disable any anti-virus software.

   For CD Install

2. If you received a CD, insert the CheckMark 1095 CD-ROM into your computer's drive.
3. When the CD icon appears on the Desktop, open by double-clicking on it and double-click the CheckMark 1095 installer.
4. Follow the on-screen instructions to complete installation.

   For Download Install

5. Click on the link provided to download. After the download is complete, double-click the download file.
6. Follow the on-screen instructions to complete installation.

The default install location on the hard drive for CheckMark 1095 is: **Macintosh HD\Applications\CheckMark\1095\(year).** The (year) represents the current calendar year.

It is recommended to install the program on the local drive.

Windows Install

1 Close all programs and disable any anti-virus software.

For CD Install

2 Insert the CheckMark 1095 CD-ROM into your computer's drive.

3 The installer will start automatically.

If the installer does not start automatically after a minute, click your **Start** menu and then select **Run.**

Type in the path and filename in the **Run** box. That would be the drive name, colon (:), backslash (\), filename. For example: **D:\setup.** Then click **OK.**

4 Follow the on-screen instructions to complete installation. **For Download Install**

5 Click on the link provided to start the download. After the download is complete, Choose **Run** or **Open.**

6 Follow the on-screen instructions to complete installation.

The default install location on the hard drive is **C:/Program Files/ CheckMark/1095/(year).** The (year) represents the current calendar year.

It is recommended to install the program on the local hard drive.

Opening CheckMark 1095: New User

1 Open the CheckMark 1095 application. You can use either the shortcut or alias that was created or go to the CheckMark 1095 folder that was installed and double-click the CheckMark 1095 application file.

The Welcome screen appears. This screen provides useful information regarding the set up of **Security, Customizing** screens and fonts**.**

Click the **Print Message** button to print out this information.

Welcome
Welcome to
CheckMark 1095 for 2015
Thank you for purchasing CheckMark 1095 for 2015!
You can start using CheckMark 1095 right away by setting up your own company and processing real 1095s. This will allow you to process four 1095s for your company before expiring, and you can continue right where you left off once you purchase the full version of CheckMark 1095 for 2015.
If you're having trouble getting started, or trouble navigating some of CheckMark 1095's more advanced features, be sure to check out the 'Help' menu for helpful links and downloads such as the Quick Start Guide and 1095 Manual.
If you just want a quick look at all that CheckMark 1095 has to offer, a sample company can be quickly downloaded from the 'Help' menu to help you explore 1095's wide range of features.
Please feel free to contact us with any questions, concerns, or feedback on your experience:
Or send us an email from the 'Contact Us' link on the checkmark.com home page.
We hope you enjoy your experience with CheckMark 1095, and don't forget to check out the other great
Print Message
Copy Message
Continue

2 Click on **Continue** to access the main window.

Create a New Database

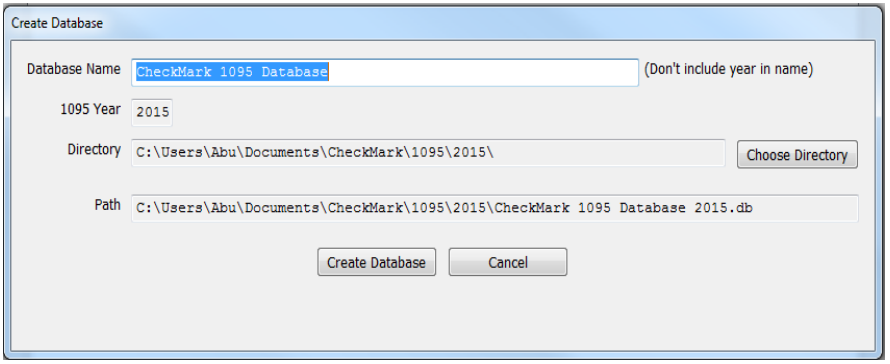
To create your own database and/or save a database in a new location, choose the **Create New Database** button.

1 Enter a name for the new database.

2 Default current year will display

3 If necessary, change the default location where you want to save the database by choosing the **Browse** button.

4 Click **Create Database** to Save the new database.



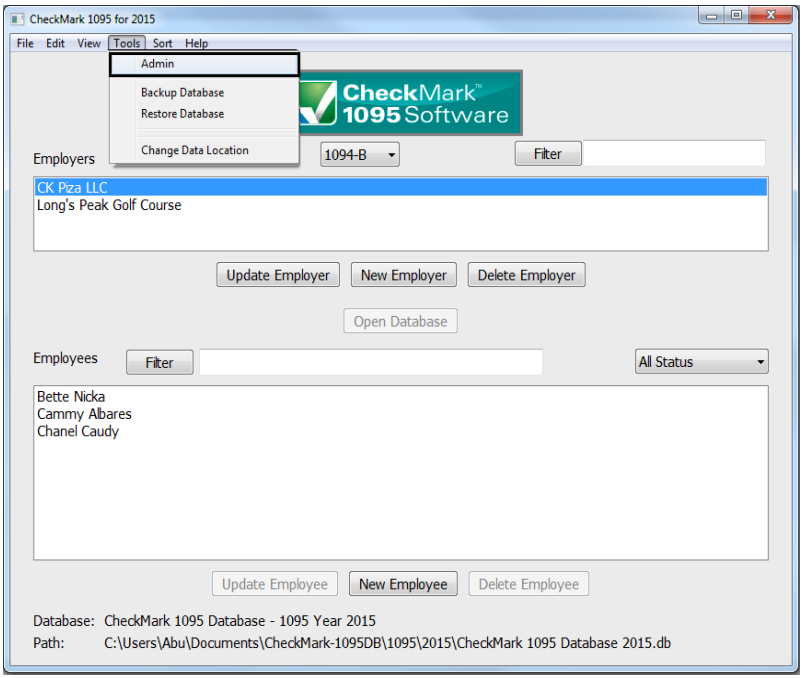
Setting up Users and Passwords 5

Chapter 2 Set up

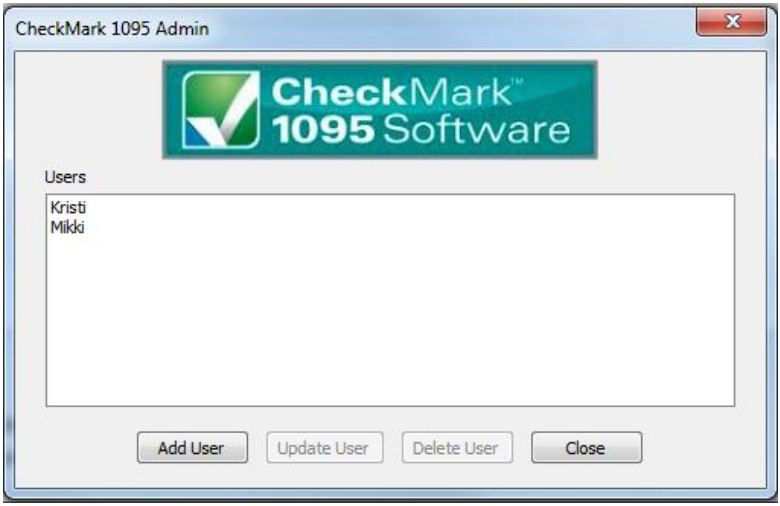
Setting up Users and Passwords

IMPORTANT: Although not required, it is recommended you set up a password to protect you private information.

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin.**



2 To create a new user click the **Add User** button.



3 Enter the **Name** and **Password.**

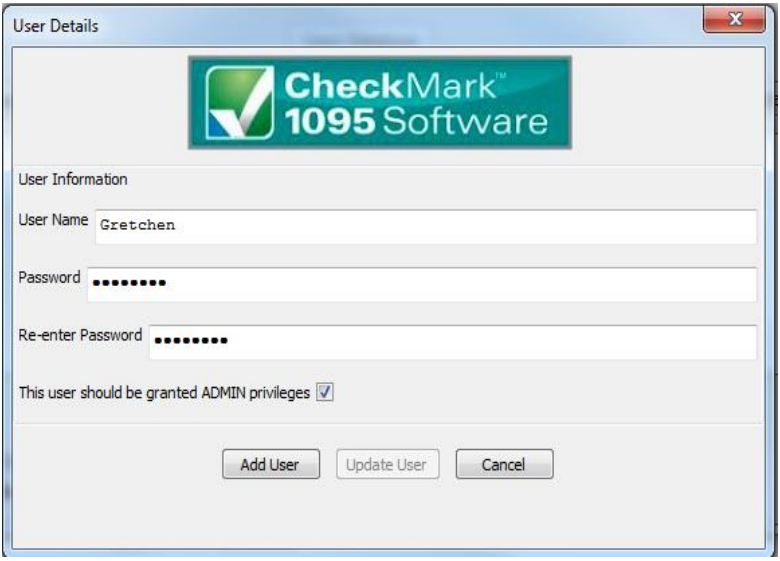
Note: The Name and Password are case sensitive.

---

4 Click the checkbox for **This user should be granted ADMIN privileges** if you want this user to be able to add, update or delete other users.

IMPORTANT: The first user set up will have **Admin** privileges. You cannot delete or change this users **ADMIN** privileges until another user with Admin privileges is created.

Users with **ADMIN** privileges can add/delete/update other users, Backup and Restore the database and Check For Updates.



Updating Users

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin.**
2. Highlight the user you want to update from the list.
3. Click the **Update User** button.
4. Make the necessary changes and click the **Update User** button to save.

Deleting Users

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin.**
2. Highlight the user you want to delete from the list.
3. Click the **Delete User** button.
4. In the popup window, verify the correct user name is selected and click the **Confirm Delete** button.

Note: If you delete all users, the software will not prompt for a password upon launching the program.

Setting Screen Font Size

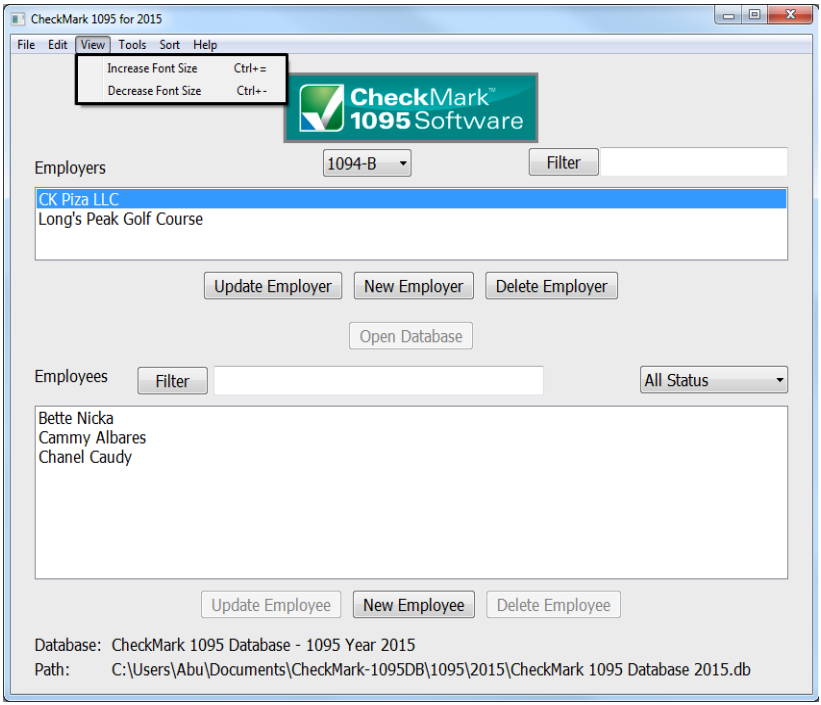
You can use the options under the View menu to set the Command Center Window color, as well as increase or decrease the screen font size for 1095 windows.

Changing the Window Font Size

You can customize the window size in CheckMark 1095 by increasing or decreasing the font size for all windows

Choose **Increase Font Size CTRL =** (Windows) or COMMAND = (Mac) from the View menu.

Choose **Decrease Font Size CTRL - (**Windows) or COMMAND - (Mac) from the View menu.

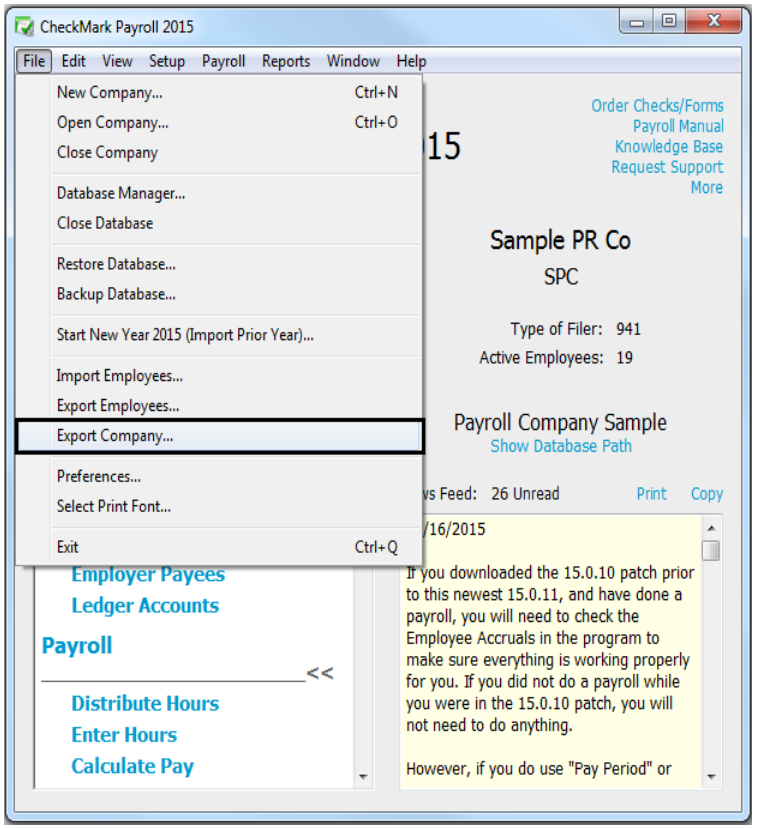


Chapter 3 Import Employer & Employees

This chapter explains how to import employer and employees information from CheckMark Payroll, MultiLedger or a tab-delimited text file.

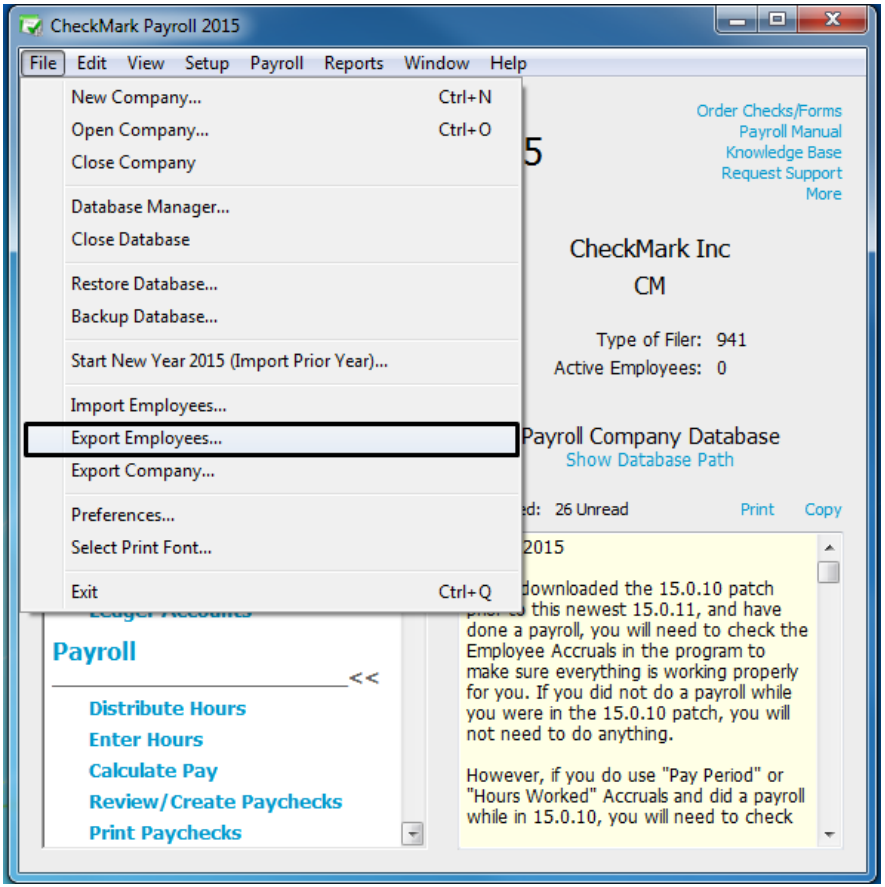
Exporting Employer from CheckMark Payroll

1 Open up CheckMark Payroll, go under the **File** menu and choose **Export Company...**


CheckMark Payroll 2015
File Edit View Setup Payroll Reports Window Help
New Company... Ctrl+N
Open Company... Ctrl+O
Close Company
Database Manager...
Close Database
Restore Database...
Backup Database...
Start New Year 2015 (Import Prior Year)...
Import Employees...
Export Employees...
Export Company...
Preferences...
Select Print Font...
Exit Ctrl+Q
Order Checks/Forms
Payroll Manual
Knowledge Base
Request Support
More
Sample PR Co
SPC
Type of Filer: 941
Active Employees: 19
Payroll Company Sample
Show Database Path
Print Copy
Employer Payees
Ledger Accounts
Payroll
Distribute Hours
Enter Hours
Calculate Pay
If you downloaded the 15.0.10 patch prior to this newest 15.0.11, and have done a payroll, you will need to check the Employee Accruals in the program to make sure everything is working properly for you. If you did not do a payroll while you were in the 15.0.10 patch, you will not need to do anything.
However, if you do use "Pay Period" or

Exporting Employees from CheckMark Payroll

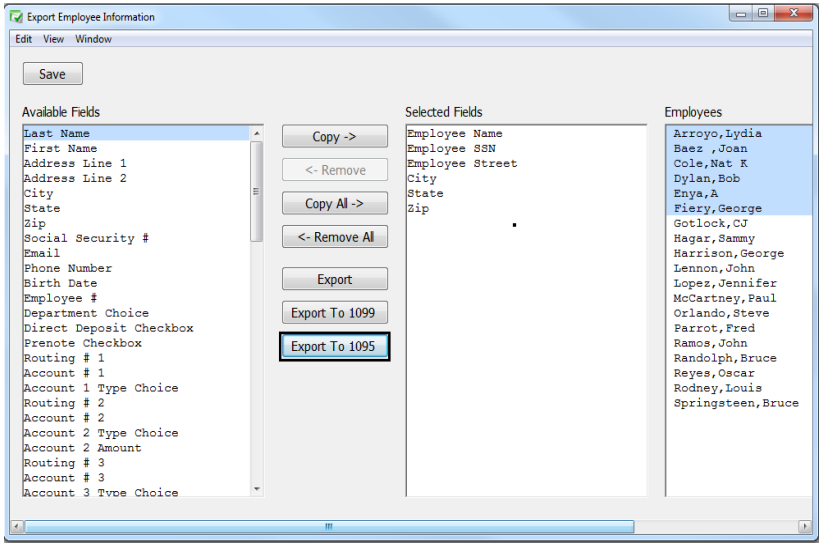
1 Open up CheckMark Payroll, go under the **File** menu and choose **Export Employee...**



2 Highlight which employees you want to export from the list.

Note: If the employees to be imported are using different types of 1095 forms, you should create multiple export files for each type of form. Example, one export file for 1095-B & one file for 1095-C.

3 Click the **Export 1095** button. The **Selected Field** list will automatically populate with the correct available fields to import into the 1095 software.

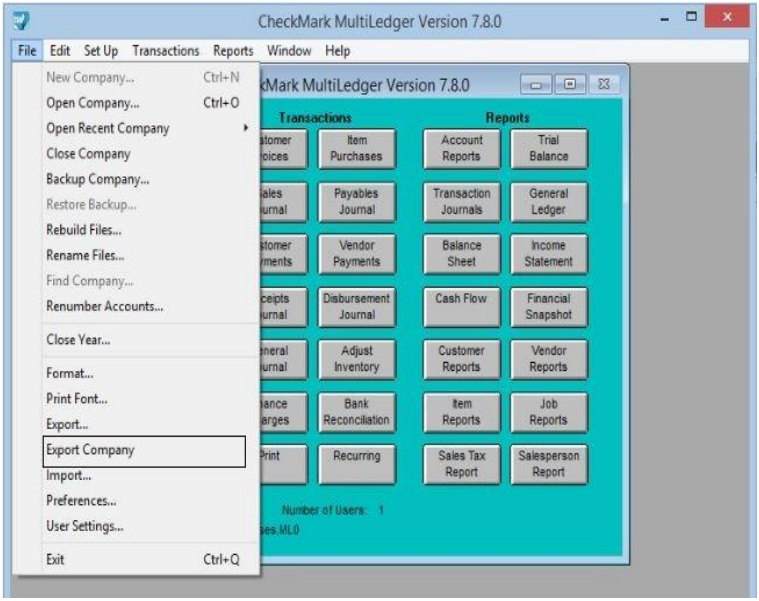


4 A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a convenient location to save the file to, an example would be your Desktop.

5 Click **Save.**

Exporting Employer from MultiLedger

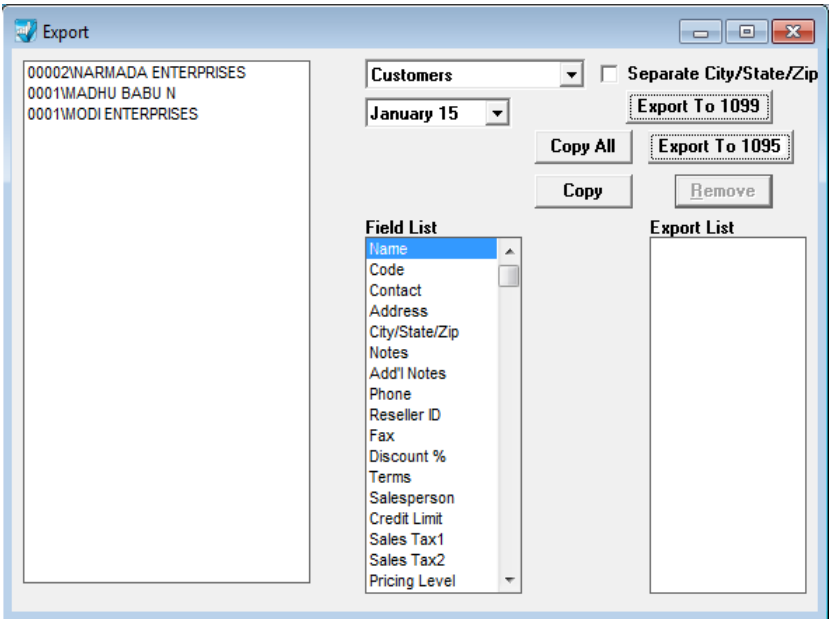
1 Open up the MultiLedger program, go under the File menu and choose Export Company



Exporting Employees from MultiLedger

1 Open up the MultiLedger program, go under the File menu and choose Export

2 Select Customers/Vendors from the drop down menu at the top.



3 Make sure you have the correct period you want and click the Export to 1095 button.

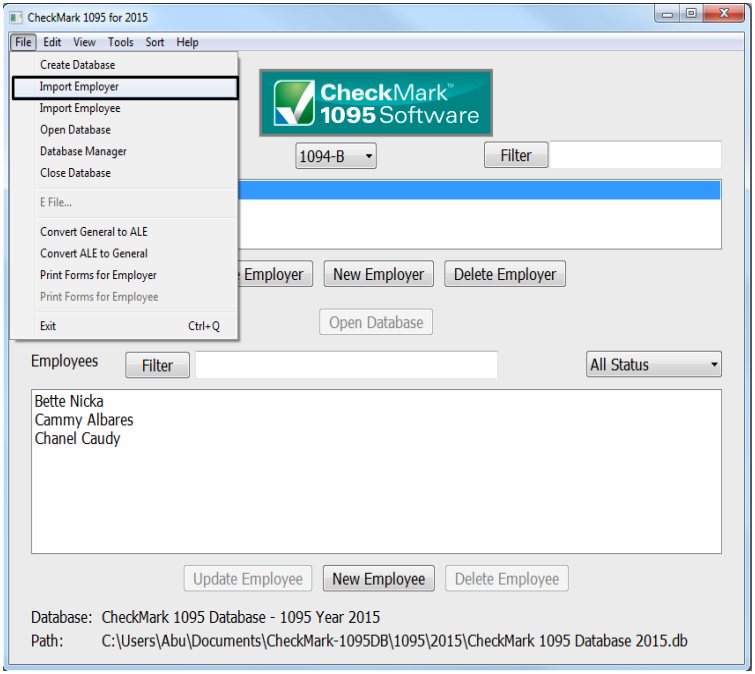
4 A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a convenient location to save the file to, an example would be your Desktop.

5 Click **Save.**

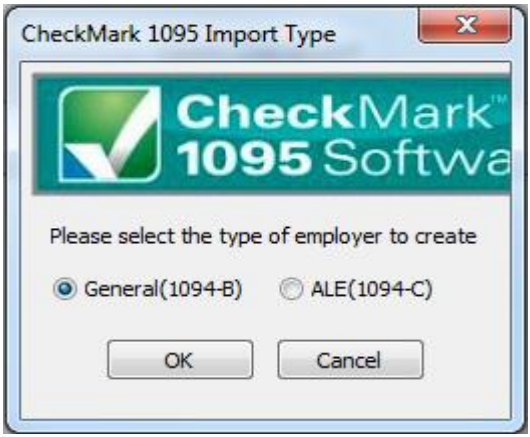
Importing Employer from CheckMark Payroll and MultiLedger

1 Open up the CheckMark 1095 application.

2 Go Under the **File** menu and choose **Import Employer**



3 In the popup window, select which type of 1095 Employer you are importing: **1094-B or 1094-C.**



4 Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically fill in for you.

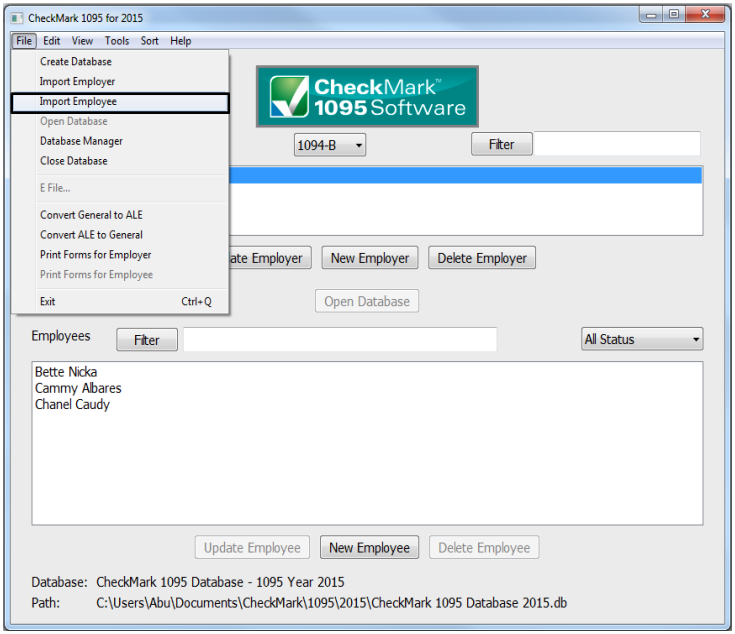
5 A **Look in** screen appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.

6 Select the text file and click **Open**. All Employers will be imported.

Importing Employee from CheckMark Payroll and MultiLedger

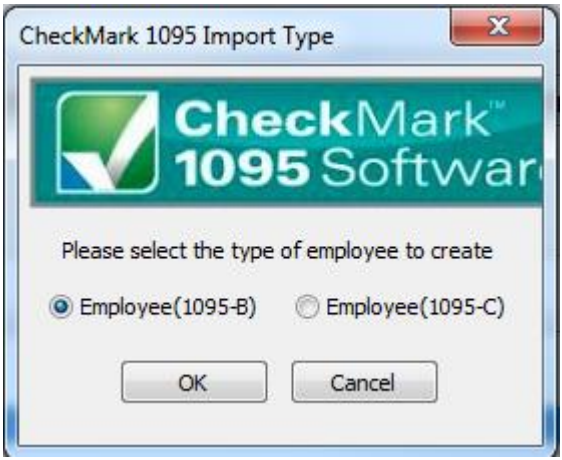
1 Open up the CheckMark 1095 application.

2 Go Under the **File** menu and choose **Import Employee**



Note: If the Employer does not exist that you want to import Employees to, you will need to create a new Employer before importing. For information on setting up an Employer, see “Creating a New Employer” on page 21.

3 In the popup window, select which **type of 1095 Employee** you are importing**: 1095-B or 1095-C**.



4 Click **the Import from Payroll or MultiLedger** button. The appropriate fields will automatically fill in for you.

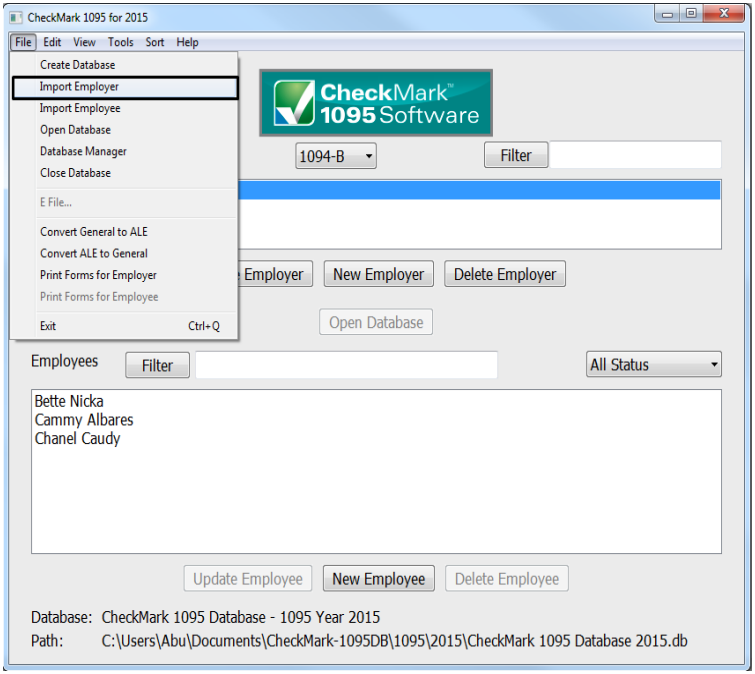
5 A **Look in** screen appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.

6 Select the text file and click **Open**. All Employees will be imported into the selected Employer.

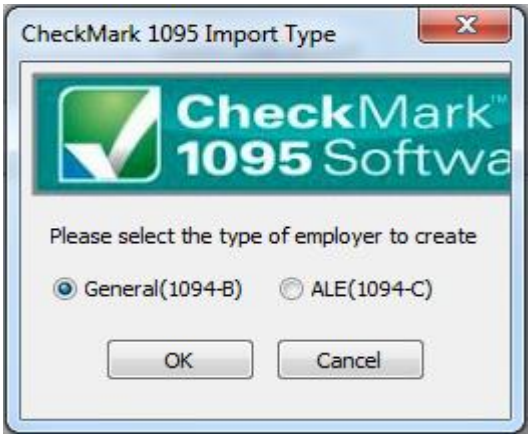
Importing Employer using a tab-delimited text file

1 Open up the CheckMark 1095 application.

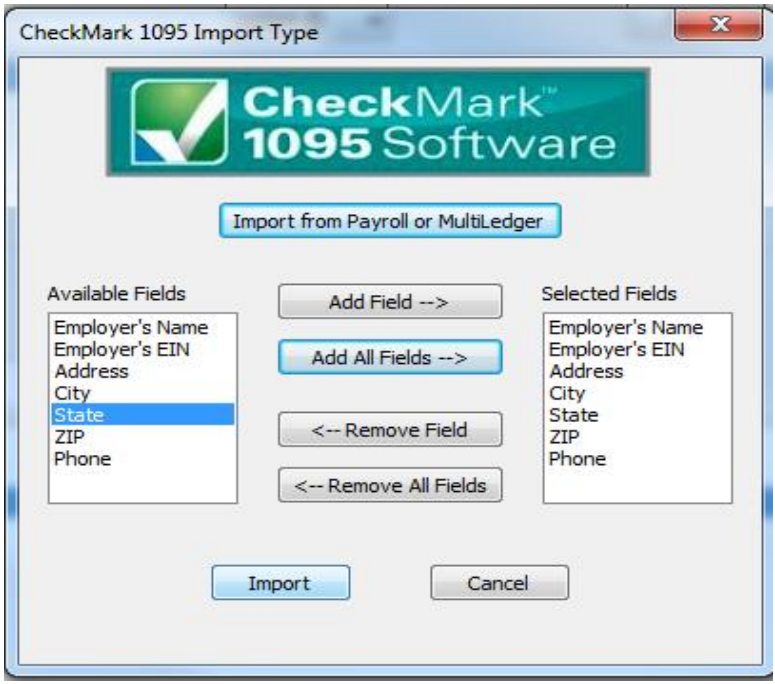
2 Go Under the **File** menu and choose **Import Employer**



3 In the popup window, select which type of 1095 Employer you are importing: **1094-B or 1094-C.** Click on OK to Continue



4 The import screen allows you to select which fields are being imported. Choose the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the Selected Field list.



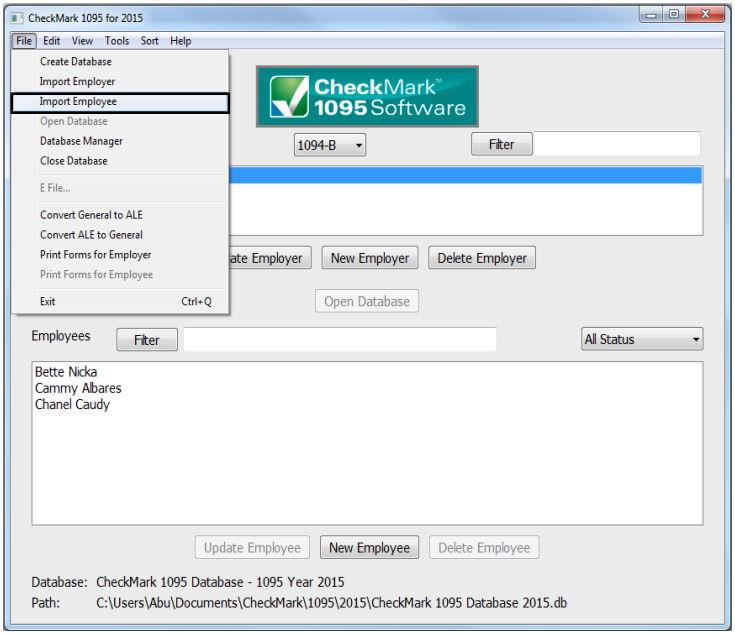
5 A **Look in** screen appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.

6 Select the text file and click **Open**. All Employers will be imported.

Importing Employer using a tab-delimited text file

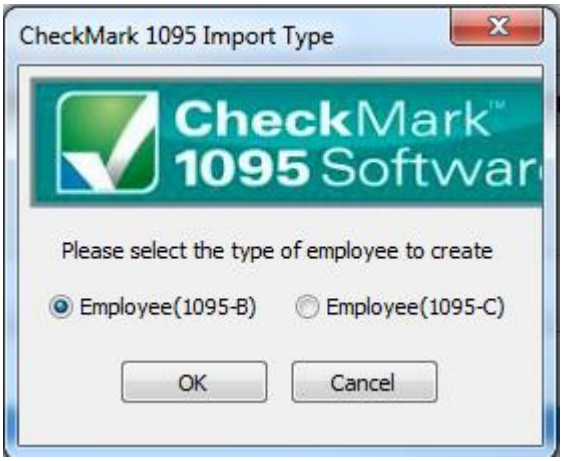
1 Open up the CheckMark 1095 application.

2 Go Under the **File** menu and choose **Import Employee**

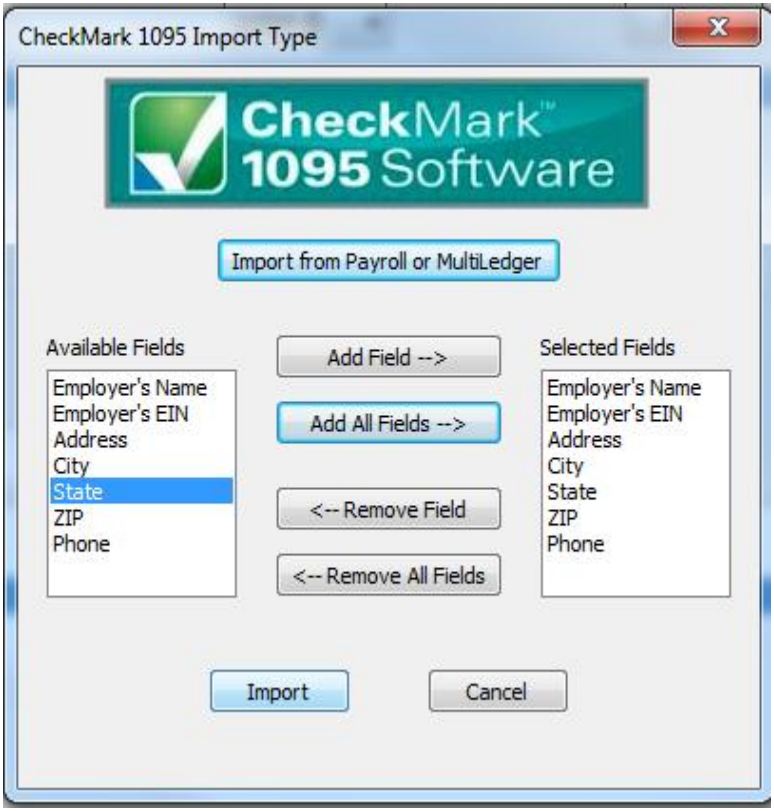


Note: If the Employer does not exist that you want to import Employees to, you will need to create a new Employer before importing. For information on setting up an Employer, see “Creating a New Employer” on page 21.

3 In the popup window, select which **type of 1095 Employee** you are importing**: 1095-B or 1095-C**.



4 The import screen allows you to select which fields are being imported. Choose the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the Selected Field list.



5 A **Look in** screen appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.

6 Select the text file and click **Open**. All Employees will be imported into the selected Employer.

Text File Format for Importing

CheckMark Forms 1095 uses a tab-delimited .txt file for importing Employer/Employees.

Each field is separated by a **Tab** with a **Return** at the end of the line before starting the next Employer/Employee. An example of a text file to be imported is below contain the **Selected Fields:** *Employer/Employee Name, Address 1, Address 2, City, State, Zip.*

Power[tab]Max[tab]44 Main St[tab]Ste 101 [tab]Fort Collins[tab]CO[tab]80525 [tab] 123-45-6789[return]

- If any fields are not applicable, for instance the Address 2 field, a space can be used as a place holder. For example:

Power[tab]Max[tab]44 Main St[tab]**"space"**[tab]Fort Collins[tab]CO[tab]80525 [tab] 123-45-6789[return]

- If no space is included, two consecutive [tabs] will also work. Example:

  Power[tab]Max[tab]44 Main St[tab][tab]Fort Collins[tab]CO[tab]80525 [tab] 123-45-6789[return]

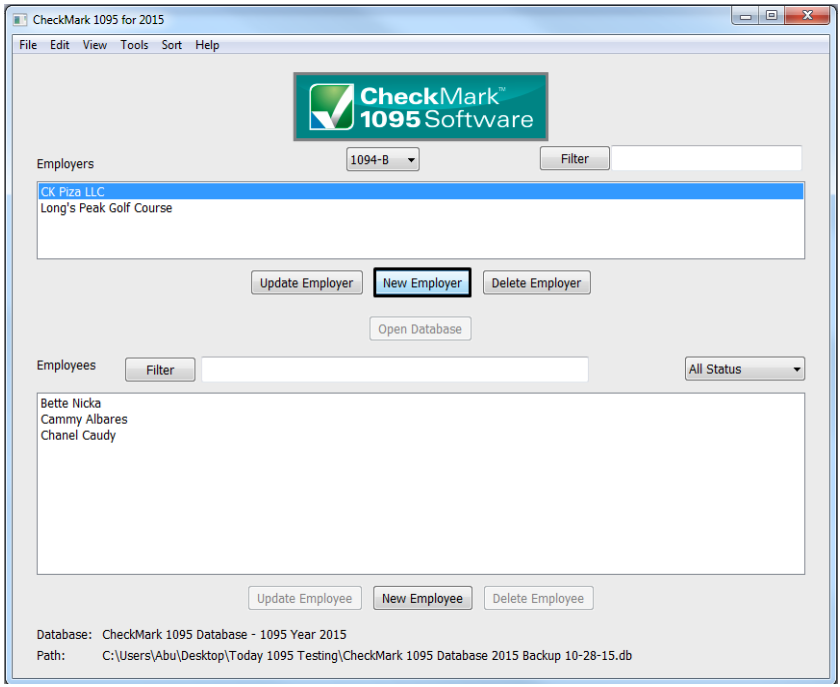
IMPORTANT: Make sure the items in the **Selected Fields** list are in the exact same order as the items in the text file being imported to ensure that all fields are imported into the correct field.

Chapter 4 Creating a New Employer

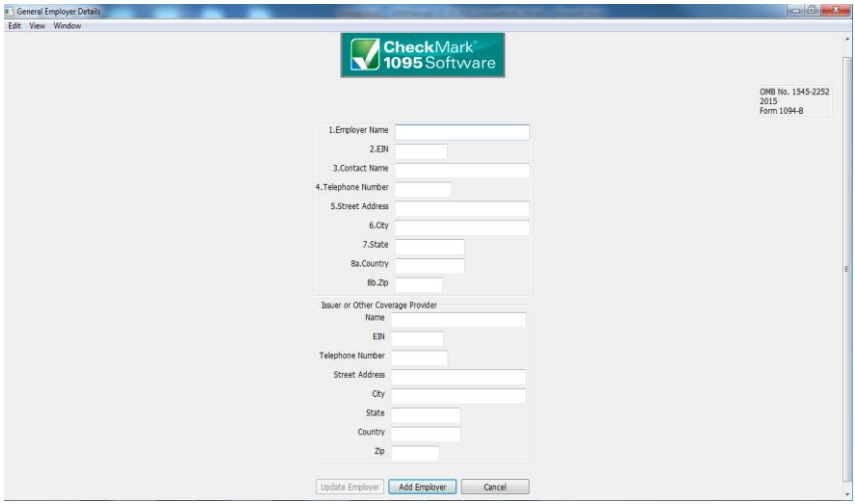
This chapter shows you how to create a new Employer and enter basic employer information.

Creating a New Employer

1 Click the **New Employer** button in the middle of the screen.

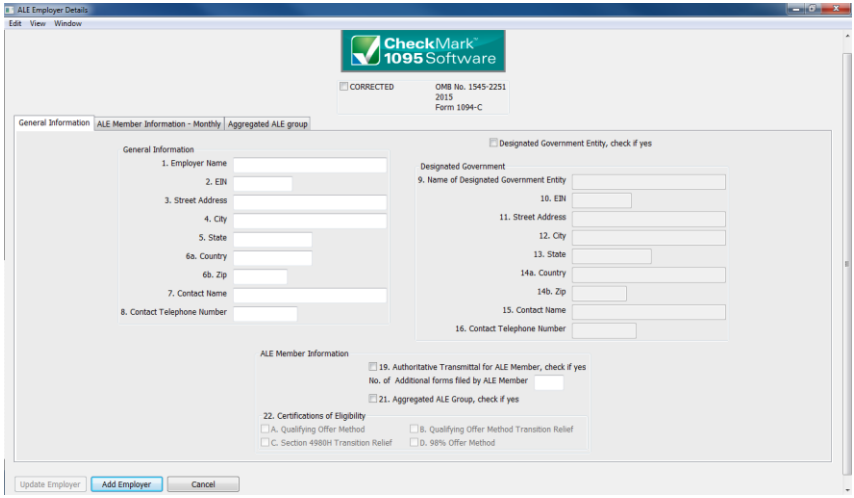


2 Enter **General Employer Information** for all pertaining fields:



Click the **Add Employer** button to **Save.**

3 Enter **ALE Employer Information** for all pertaining fields:



Click the **Add Employer** button to **Save.**

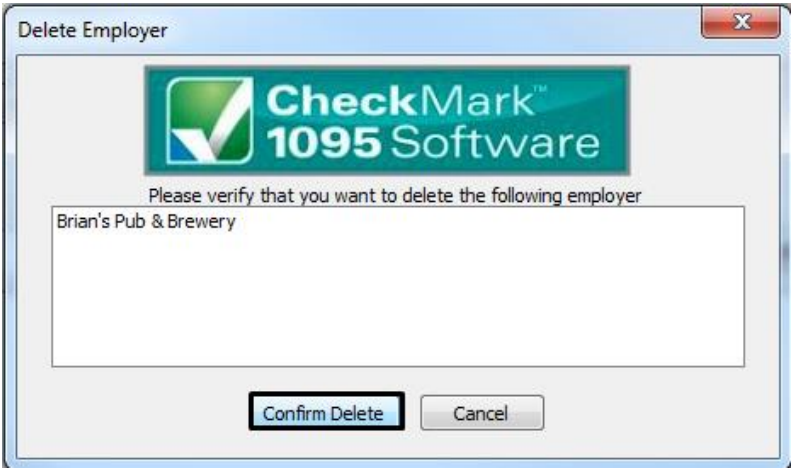
Updating an Existing Employer

1. Highlight the employer in the list you wish to update and click the **Update employer** button.
2. After all changes have been made to the **employer,** click the **Update employer** button to save the changes.

Deleting a employer

You cannot delete a employer if there are any employees created within the employer. You must delete the employees first before deleting a employer. For information on deleting employees, see “Deleting a employees” on page 33.

1. Select the employer you wish to delete.
2. Click **Delete employer.**
3. In the pop up window, click the **Confirm Delete** button.



If no employees are associated with this employer, the employer will be deleted.

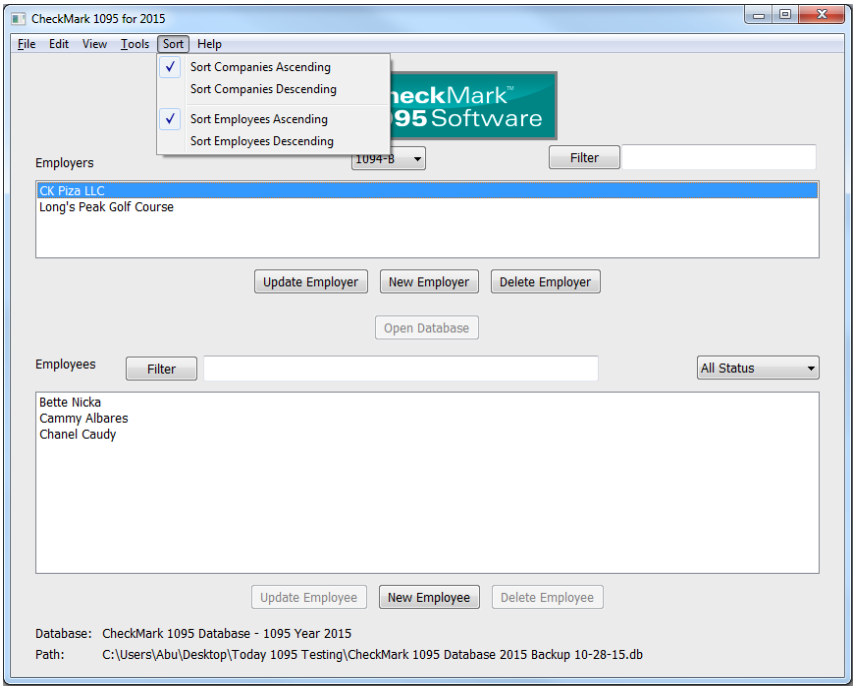
Filtering Employers

You can use the **Filter** button to search for certain employers in the list. To find a particular employer, enter all or part of the name of the emloyer into the Filter box area at the top of the screen and click the **Filter** button. The Filter will search for any employers that contain those variables.

You can also use an asterisk (*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N*), you will receive all employers that start with the letter "N".

Sorting Employers

You can sort employers by Ascending or Descending order. To select which type of sort to use, go under the Sort menu at the top of the screen and choose either Sort Employers Ascending or Sort Employers Descending.



Chapter 5 Setting up Employees

This chapter shows you how to setup new Employees for each Employer.

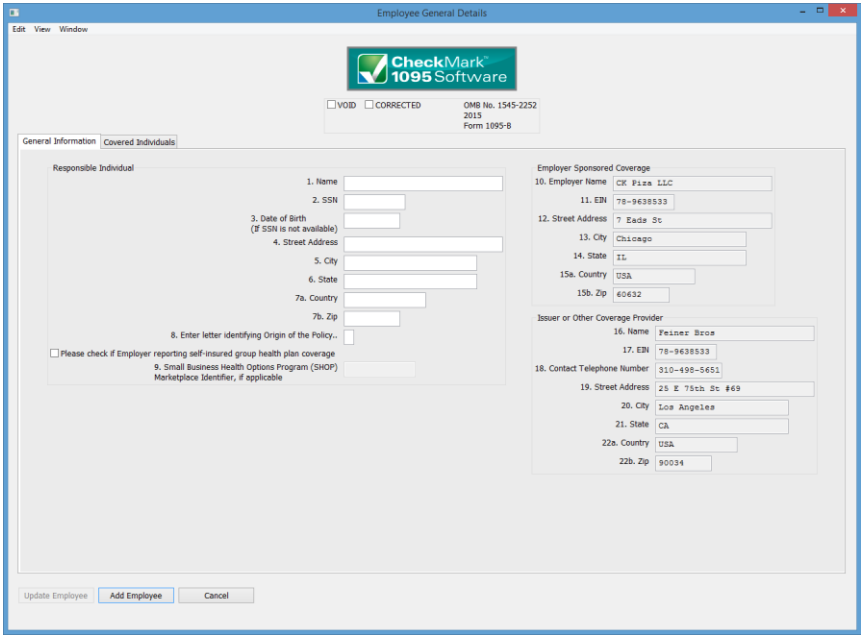
Creating New Employee

1 Select an Employer from the list. If no Employers are listed, you must first set up an Employer before adding Employees. For information on setting up a new Employer, see “Creating a New Employer” on page 21.

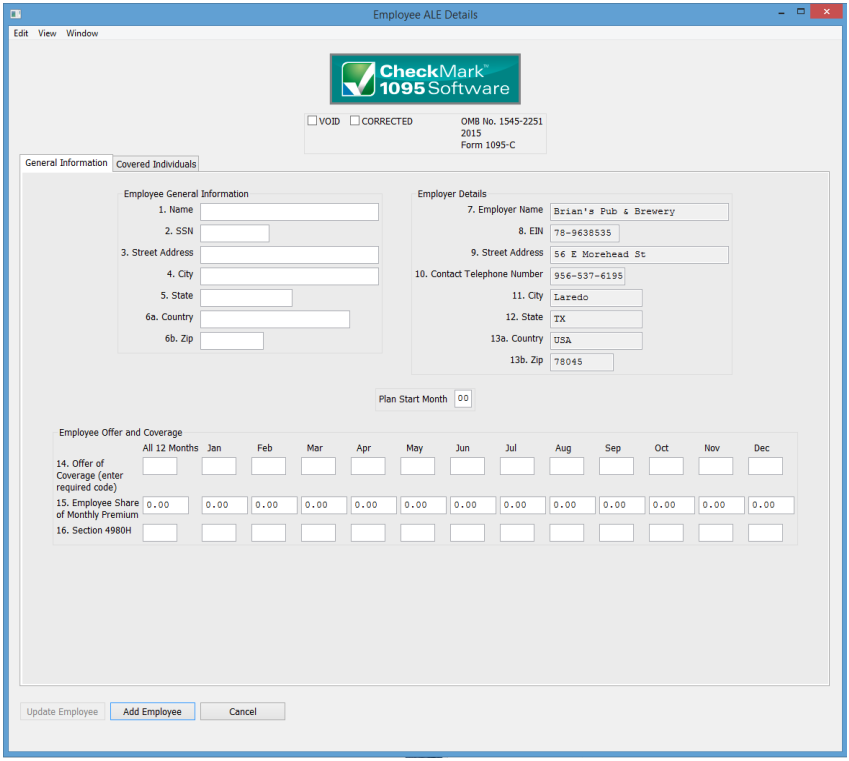
2 Click the **New Employee** button.

3 Enter the **Employees Name** along with the **Employee Information.**

General Employee:



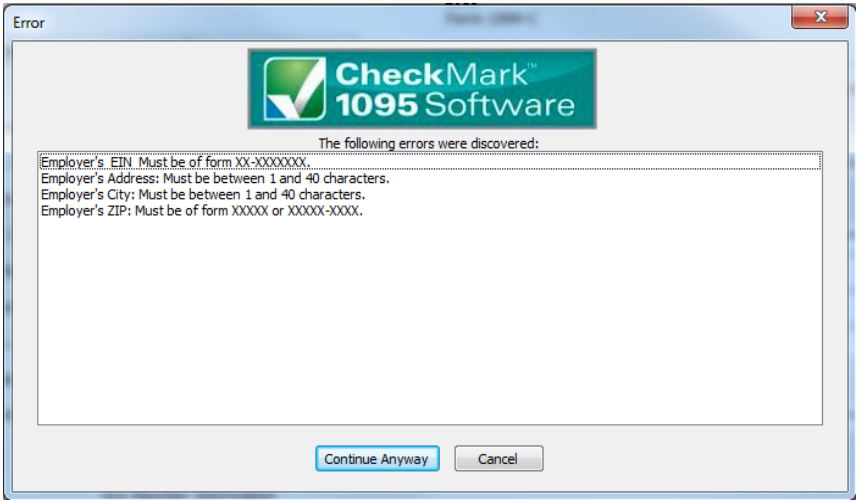
ALE Employee:



4 Fill in any fields that are applicable for the Employee.

5 Click the **Add Employee** button to **Save** the information.

If any information is incorrect, a pop up window will open explaining which fields have errors.


Error
CheckMark 1095 Software
The following errors were discovered:
Employer's EIN Must be of form XX-XXXXXXX.
Employer's Address: Must be between 1 and 40 characters.
Employer's City: Must be between 1 and 40 characters.
Employer's ZIP: Must be of form XXXXX or XXXXX-XXXX.
Continue Anyway
Cancel

Press **Cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the Employee information.

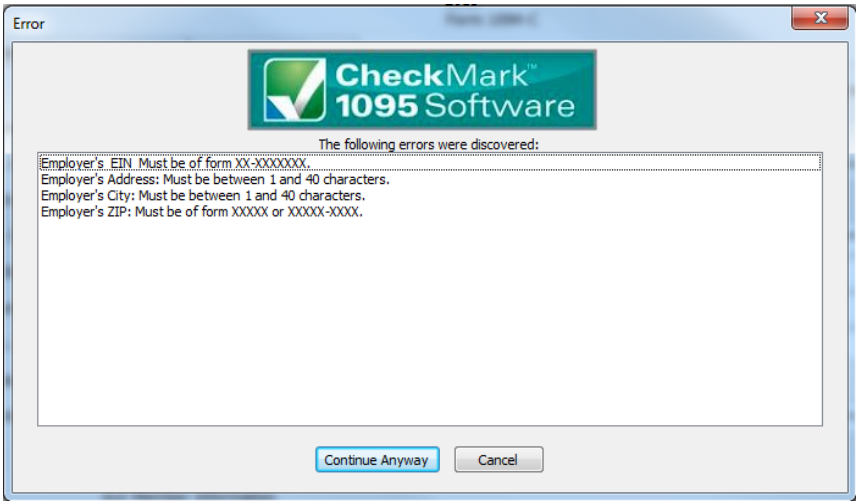
NOTE: If any field is not filled in correctly, once you return to the Employee set up screen, that field name will show up in **"Red".** In addition, some fields will not save the incorrect information and remain empty. For more information on Validated Information, see "Validated Status" on page 37.

The new Employee should now appear in the Employee list on the main screen with the Employer name highlighted.

Updating an Existing General/ALE Employee

1. Highlight the Employee in the list you wish to update and click the **Update Employee** button.
2. After all changes have been made to the **Employee Information,** click the **Update Employee** button to save the changes.

If any information is incorrect, a pop up window will open explaining which fields have errors.


Error
CheckMark 1095 Software
The following errors were discovered:
Employer's EIN Must be of form XX-XXXXXXX.
Employer's Address: Must be between 1 and 40 characters.
Employer's City: Must be between 1 and 40 characters.
Employer's ZIP: Must be of form XXXXX or XXXXX-XXXX.
Continue Anyway
Cancel

NOTE: If any field is not filled in correctly, once you return to the Employee set up screen, that field name will show up in **"Red".** In addition, some fields will not save the incorrect information and remain empty.

Deleting a Employee

1 Select the Employer that contains the Employee(s) you wish to delete.

2 Highlight the Employee name from the list.

If you want to delete more than one Employee, you can highlight more than one Employee. See, "Selecting Multiple Employees" on page 38.

3 Click the **Delete Employee** button.

4 A pop up window appears. Confirm these are the employees you want to delete.

5 Click **Confirm Delete** to complete the process.

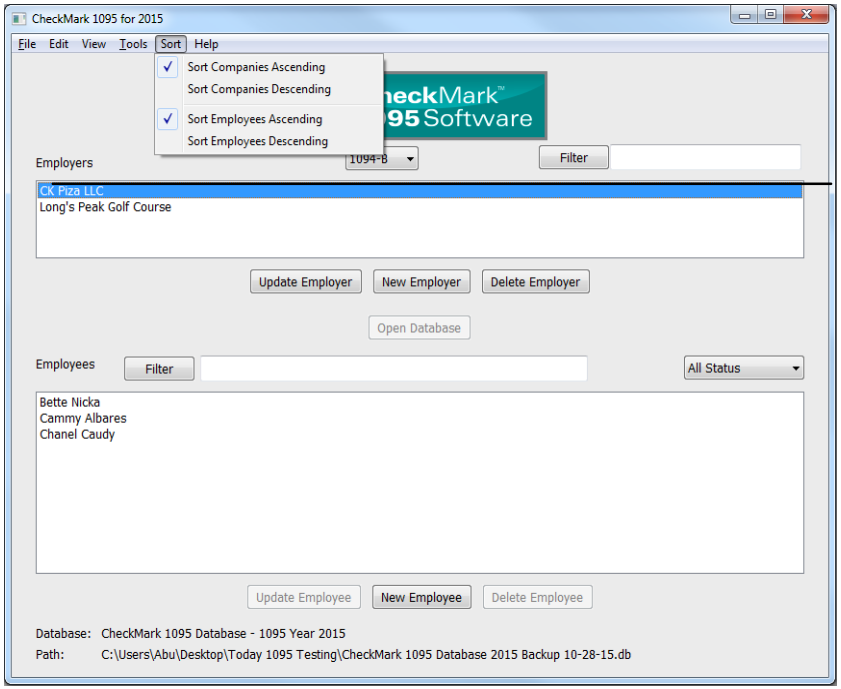
Filtering Employees

You can use the **Filter** button to search for certain Employees in the list. To find a particular Employee, enter all or part of the name into the **Filter** box area at the top of the screen and click the **Filter** button. The Filter will search for any Employees that contain those variables.

You can also use an asterisk (*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N*), you will receive all Employees that start with the letter "N".

Sort Employees

You can sort Employees by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Employees Ascending** or **Sort Employees Descending.**

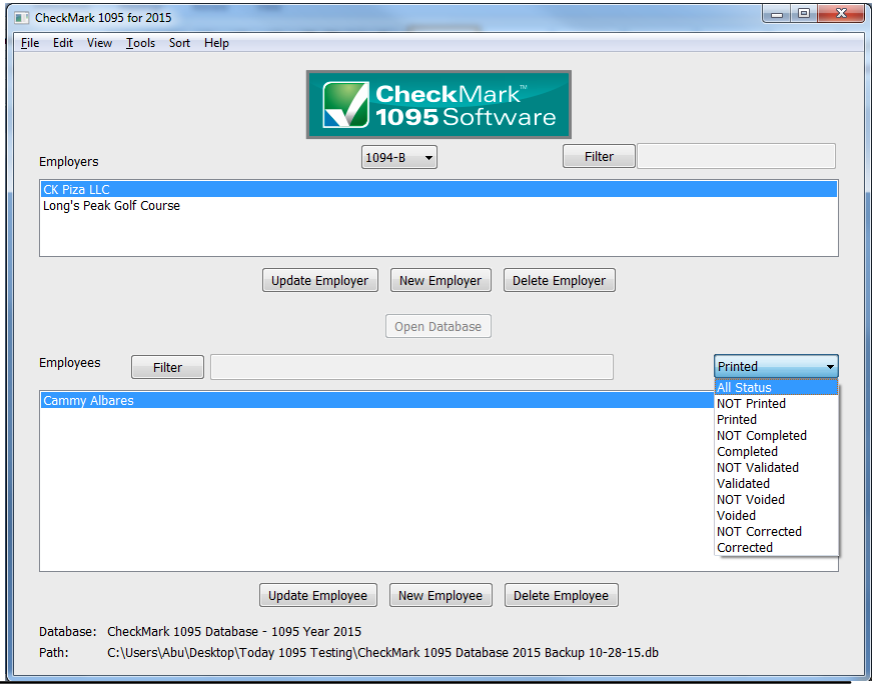


Status

The **Status** drop down menu has certain states Employees are categorized in based upon their setup and completion of being printed. You can sort using the different options to see which employees have been **Printed, Completed, Validated, Voided** or **Corrected.**

Employees can be in multiple states at the same time; however you can only sort on one status at a time.

NOTE: Before choosing a **Status,** you should first select one or multiple Employers in the list. For information on selecting multiple Employers, see “Selecting Multiple Employers” on page 25.



Printed Status

You can easily sort using this status to see which Employees you still need to print 1095s for regarding the Employee copies.

You can select either **Printed** or **NOT Printed** status to sort Employees on whether or not you have printed a 1095 for them. Once you select the **Print Forms for Employee** command from the **File** menu, that Employee will automatically be moved to the **Printed** status from the **NOT Printed** status.

Completed Status

You can use the **Completed** status to determine which Employees you have, or have not, printed or eFiled forms that are related to the Employer copies.

Once you select the **Print Forms for Filing** option under the **File** menu, Employees listed under **NOT Completed** will be moved to the **Completed** mode.

Validated Status

Sorting by **Validated** or **NOT Validated** helps you easily determine if there is any Employee that is not set up correctly. In the Employee screen, certain fields require specific characters, numbers, etc. to be accepted upon filing.

Choose **Validated** to see which Employees are ready to be filed. Choose **NOT validated** to see any Employees that may have some set up criteria that is incorrect for filing purposes. Once you have sorted on **NOT Validated,** select a Employee and click on the **Update Employee** button to view the set up and make necessary changes. Fields marked in **"Red",** do not meet the requirements for filing on that particular field. Corrections should be made.

Voided Status

In the Employee set up screen, there is a checkbox at the top of the screen for **Void.** If you filed a 1095 for an Employee that was unintended, you can mark **Void** to resend the 1095 for that Employee as a zero status.

Choosing a **Voided** status will list all Employees marked **Void** in the Employee set up screen. All other Employees that are not marked **Void** in the Employee set up screen are listed as **Not Voided** for a status.

Corrected Status

In the Employee set up screen, there is a checkbox at the top of the screen for **Corrected.** If you have filed an incorrect 1095 and need to resubmit a new 1095 with updated information, mark the **Corrected** checkbox in the Employees set up screen before submitting the new 1095 information.

The **Corrected** status will list all Employees who are marked **Corrected** in the Employee set up screen. All other Employees that are not marked **Corrected** will be listed as **Not Corrected.**

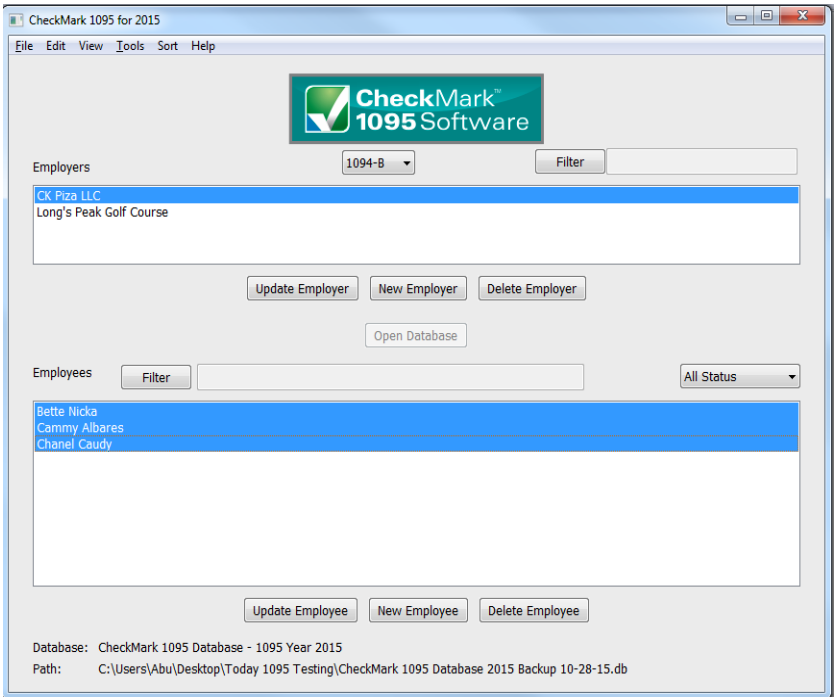
Selecting Multiple Employees

Consecutive Selection

Windows: You can select multiple Employees by clicking the first Employee while holding down the mouse button and moving the mouse pointer down through the list.

You can also click on the first Employee, hold down the 'Shift' key on the keyboard, and then click on the last Employee you want in the list.

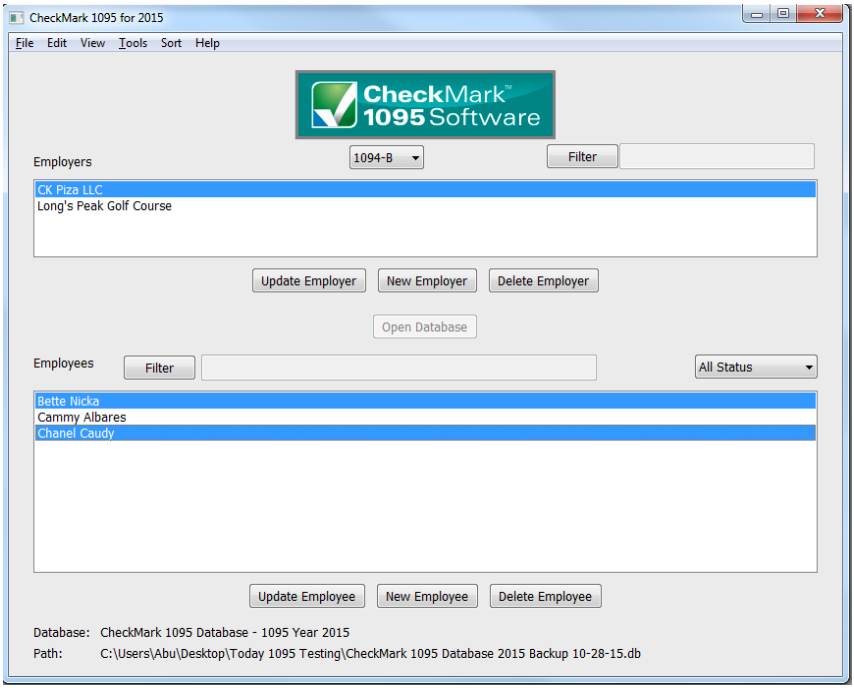
Macintosh: Click on the first Employee you want in the list, hold down the 'Shift' key on the keyboard, and then click on the last Employee you want in the list.



Non-Consective Selection

Windows: To select specific Employees as a group, click on the first Employee you want, hold down the 'Ctrl' key on the key board and click on any other Employees you want to include.

Macintosh: To select specific Employees as a group, click on the first Employee you want, hold down the 'Command' key (also referred to as the Apple key) on the key board and click on any other Employees you want to include.



Chapter 6 Printing 1095s

This chapter shows you how to print 1095s for the Employer and each Employee.

While CheckMark Inc attempts to maintain up-to-date and accurate tax and form information, we cannot be responsible for changes or discrepancies in tax values and forms that are filed incorrectly.

IMPORTANT: You must install the latest version of Adobe Reader to print the 1094s and 1095s forms properly. Go to www.adobe.com to download the latest update.

Print 1094s for Each Employer and 1095s for Each Employee

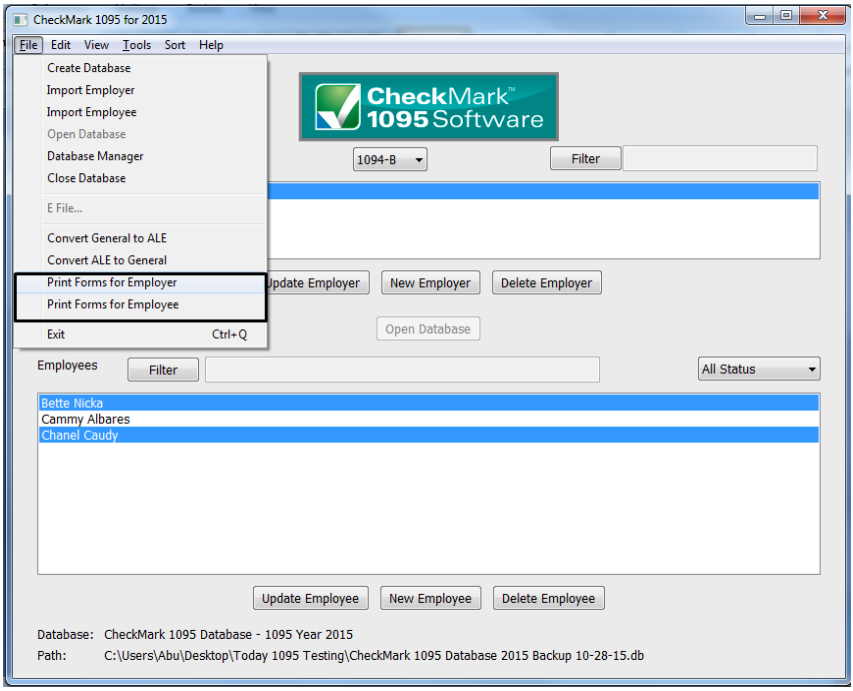
1 Select the Employer you wish to print 1094s: **1094-B & 1094-C**

2 Select which type of 1095 form you want to print from the Forms drop down menu; **1095-B & 1095-C.**

3 Select which Employee(s) in the list you would like to print forms for. If no Employees are selected, all Employees will be included.

Note: you can sort the Employees by Status drop down menu to group Employees as **Printed, Completed, Validated, Corrected** and **Void.** For more information on using the Status drop down menu and what each Status means, see "Status" on page 36

4 Under the **File** menu, select the **Print Forms for Filing** option.



Printing 1095s for Employees

1 Select the Employer you wish to print 1095 forms for.

2 Select which type of 1095 form you wish to print from the Forms drop down menu; **1095-B & 1095-C**

3 Select which Employee(s) in the list you wish to print 1095s for.

4 Under the **File** menu, select the **Print Forms for Employee** option.

Chapter 8 Backup and Restore

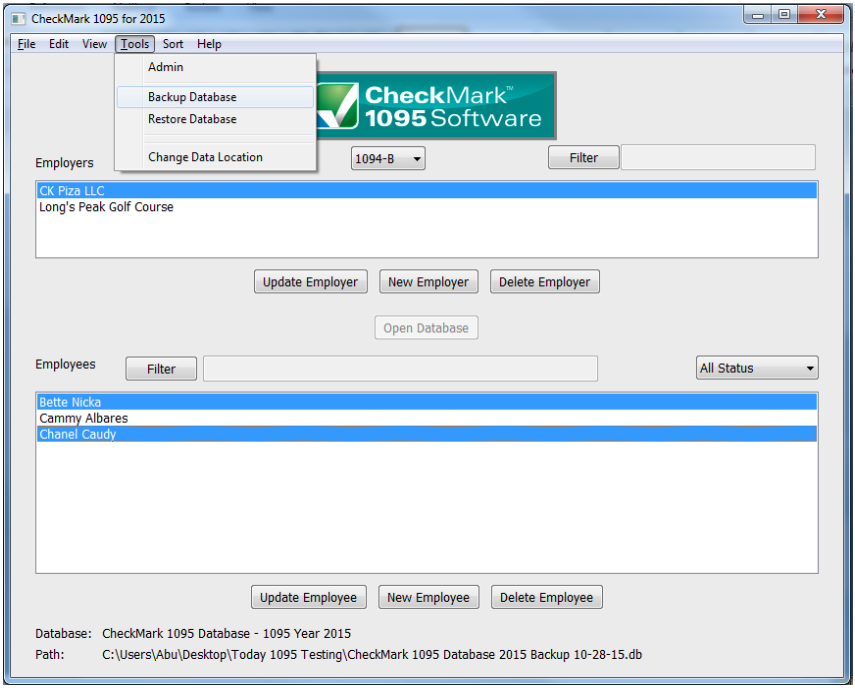
Making backups is critical in protecting your data. You should always keep current backups. CheckMark 1095 allows you to easily backup your data to any external source for safekeeping.

Backing Up Using the Backup Database Command

Using the **Backup Database** command within the program allows you to backup a duplicate copy of the database. You can restore this database in case of computer failure or to revert back to a prior database in case of error in your current database. It is recommended you make current backup databases anytime you modify information.

NOTE: Only users set with **Admin privileges** can backup and restore a database. For more information on setting up Admin privileges, see "Setting up Users and Passwords" on page 7

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Backup Database.**



2 A **Save In** dialog box opens. Choose a destination you would like to save the backup database too.

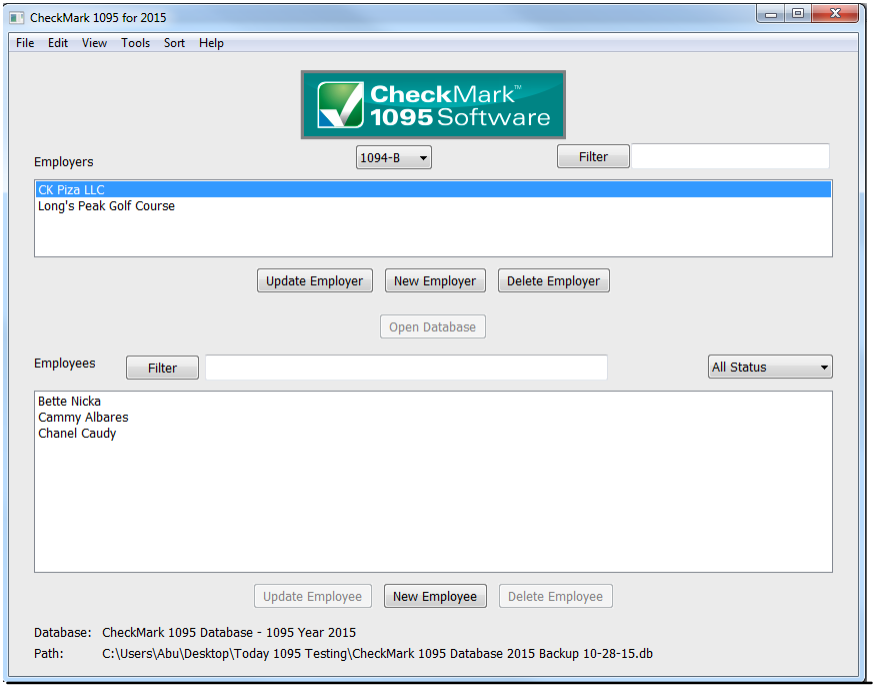
3 A default name is given of **backup.db.** Change the name of the backup if you wish.

4 Click **Save.**

Restoring Database using Restore Database Command

In case of computer failure, corruption or if you made a mistake and would like to revert back to an previous database, the **Restore Database** command will open up any prior backups you have saved.

1 Click on the **Tools** menu in the upper left hand corner of the screen and select **Restore Database.**



2 A **Look in** dialog box opens. Browse to the location of your Backup Database file.

3 Select the file and click **Open.**

Important: Restoring a database file will **overwrite the existing .db file.** Restoring a database file is used in cases of the current file becoming damaged or the wrong information being entered into the current database and restoring from a prior database is faster than manually updating the incorrect information.

Backing up the Entire Folder

Making a copy of the entire folder is a quick and easy way to backup up both the data and application files when you complete filing 1095s for the calendar year. It is recommended you copy the entire folder off the hard drive of your computer onto a flash drive or CD for safe keeping.

1 Find the location on your hard drive where the CheckMark Forms 1095 program was installed. For more information on installation, see "Installing CheckMark 1095" on page 1.

2 Make a *duplicate copy* of this entire folder or *Copy and Paste* this folder to a new location. It's best to save on to a flash drive, CD-ROM or any external drive in case of computer failure. Refer to your operating system's manual on instruction on how to duplicate/copy and paste.

3 A good practice is to rename the backup folder with *today's date* or *finished year* so you know how current the backup is. Make sure to rename the **Folder Only. Do not rename any files inside the folder itself.**

4 If you ever need to access the backup, simply copy the entire folder from your backup source, to your computer, open up the folder and open up the application by double-click the CheckMark Forms 1095 icon.